## DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION

Schedule No. C1307

RE	CORDS RETENTION AND DISPO	Page 1 of 3	
Agency		Division/Unit	
County C	ommissioners of Calvert County, M	D Hum	an Resources-Benefits
Item No.	Descripti	ion	Retention
	"The issuance of a legal hold by th overrides any portion of this recorschedule that otherwise calls for the destruction of records subject to the been released by the County Attoris subject to a legal hold may be alternsferred, or destroyed, even if the date has passed. Any person preparamsfer, or destroy a record must litigation hold applies to the record	·	
1	Employee Health Insurance and R	etirement Records	
	Employee and retiree health and retire	rement records.	Once record becomes inative at seperation, scan to Maryland State Archives standards and destroy paper original. Retain electronic version for 7 years after death of employee and beneficiary, then destroy.
2	Voluntary Benefit Records		
	Long term disability, life insurance, reconciliation records.	flexible spending billing	Retain 3 years, then destroy.
Calandala A	1 December 1	C-1-1-1- A-41	A 1. Y. Jua
• •	proved by Department, Agency, Lepresentative.	Schedule Authorized by State  Date	8-2018
Signature	Paula N. Hay		O(L)
Typed Name	Paula G. Gray	Signature	1 Balls
Title Direct	tor, Human Resources.		

## DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS RETENTION AND DISPOSAL SCHEDULE (Continuation Sheet)

Schedule No. C1307

Page 2

of 3

Agency
County Commissioners of Calvert County, MD

Division/Unit Human Resources-Benefits

County Commissioners of Carvert County, MD				
Item No.	Description	Retention		
3	Pension Plan Records			
	Documentation to include meeting minutes, plan documents, amendments, statements for pension and Other Post-Employment Benefits (OPEB) trust.	Retain 100 years, then destroy.		
4	Pension Investment Records			
	Documentation of investments for pensions and Other Post- Employment Benefits (OPEB) trust.	Retain 5 years, then destroy.		
5	Executive Correspondence (Email Only)			
	Incoming and outgoing business-related correspondence that provides unique information relating to the functions, policies, procedures or programs of an agency. These records document executive decisions made regarding agency interests. The executive decision maker is the agency director.	Permanent. Retain for 1 years, then transfer to the Maryland State Archives.		
6	Administrative Correspondence (Email Daly)			
	Incoming and outgoing business-related correspondence created in the course of administering agency functions and programs.  Administrative correspondence documents work accomplished, transactions made, or actions taken. This correspondence documents the implementation of agency functions rather than the creation of functions or policies. Business-related correspondence that is related to a core function of an associated series should follow the associated retention period.	Retain for 1 year, then destroy or purge from email system.		

## DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS RETENTION AND DISPOSAL SCHEDULE (Continuation Sheet)

Schedule No. C1307

Page 3 of 3

Agency
County Commissioners of Calvert County, MD

Division/Unit Human Resources-Benefits

em ).	Description	Retention
7	Transitory Correspondence (Email Only)	
	Incoming and outgoing correspondence related to matters of short term interest. Transmittal correspondence between individuals, departments or external parties containing no final contractual, financial or policy information. This correspondence does not impact agency functions. When resolved, there is no further use or purpose.	Retain until administrative need ends and then destroy
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	•	

					ACENCY DECORDS INVENTORY	
Instructions -Type or Print a separate form for					AGENCY RECORDS INVENTORY	
each new or revised record series. Forward		SEMENT DIVIS		,		
with Records Retention Schedule (DGS 550-1)	1215		pad, P.O. Box : wland 20794	275	PAGEOF	
		Jessup, Mar 410-79	9-1930	السيد.		
Department/Agency	2. Divisio	חי			3. Unit	
Board of County Commissioners for Calvert	Departme	ent of Human	Resources		Benefits .	
County, MD						
DEFINITION: RECORD SERIES: A group of relater	do n			· ···!t far raf		
purposes.	a records ii	Ormany med a	anu useu as a	Unit ioi iei	егепсе аз well as гетенции ани изрозити	
4. Record Series Title					st Year/Latest Year	
Employee Health Insurance and Retirement Recon	ds			197	9 to 2017	
C. Danad Carles Description (Briefly describe the t			···	الاستان	harded the common of the state of the	
<ol><li>Record Series Description (Briefly describe the t series.)</li></ol>	ypes of into	armation/docu	ments/forms is	ouna in trie	e series. Include the purpose or function of the	
Employee and retiree health and retirement records	s Inactive f	files are scan	ned to Marylan	nd State Ar	chives standards and maintained in electronic	
format for storage and retention.	3. IIIuuu .	illes are sea.,.	1160 10 19101 3101	lu Otato ru	Clives standards and maintained in closifolia	
Tomac of State and Table					1	
7. Record Series Format(s) List all		8. Record Serie	- Secuence	9. Volume	·	
7. Reculu Selles Fullifaça) — List all		6. REWILL SEIN	S Sequence	9. Volume	_	
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		Numerical		· 🛛 File Dra	` `	
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Other (specify) Electronic		Other (spec	ify)	10. Annual	Accumulation	
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Current Location(s) (Bldg., Floor, Room)     Department of Human Resources, County Services Plaza, Suite 10	01		14. Is Record S	enes Duplicat	ed Elsewhere? (If yes, specify agency or office.)	
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)			16. Audit Requirements			
☑ Yes ☐ No HIPAA			M Nasa I	□ s: □	Fodom	
DIFAA	HIPAA			Diale C	Federal Independent	
77						
17. Is an Index System used? If yes, explain briefly and describe r  ☐ Yes ☑ No	equirements		18. Recomi			
<del>_</del> .					inactive at separation, scan to Maryland State	
				Archives standards and destroy paper original. Retain electronic v		
19. Name and Title of Preparer		20 Tolopho		21. Date	of employee and beneficiary, then destroy.	
Paula Grover Gray, Human Resources Director		20. Telepho	00 ext. 2367	8/15/201		
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Instructions –Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL RECORDS MANAGEMENT 7275 Waterloo Road, P.O Jessup, Maryland 20 410-799-1930		SEMENT DIVIS ad, P.O. Box 2 yland 20794	MENT DIVISION d, P.O. Box 275 and 20794 930		
1. Department/Agency	2. Divisio		_		3. Unit	
Board of County Commissioners for Calvert	Departmo	ent of Human	Resources		Benefits	
County, MD						
DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and purposes.						
4. Record Series Title			5. Earliest Yea		st Year/Latest Year	
Voluntary Benefit Records				201	2 to 2017	
6. Record Series Description (Briefly describe the	types of info	ormation/docu	ments/forms fo	ound in the	series. Include the purpose or function of the	
series.)						
Long term disability, life insurance, flexible spendir	ng billing re	conciliation re	cords.			
7. Record Series Formal(s) List all	—Т	8. Record Series	Sequence	9. Votume		
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Daily Deekly 🛭 Monthly 🗋 An	nually	Number		Month(s) Year(s)		
13. Current Location(s) (Bldg., Floor, Room)		· · · -	14, Is Record S	eries Duplica	ted Elsewhere? (If yes, specify agency or office.)	
Department of Human Resources, County Services Plaza, Suite 1	101		☐ Yes ☑ No			
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)			16. Audit Requ	rirements		
☐ Yes   ☑ No			⊠ None	State	Federal Independent	
17. Is an Index System used? If yes, explain briefly and describe	requirements		18. Recom	mended F		
☐ Yes   ☑ No					destroy paper records.	
·						
19. Name and Title of Preparer		20. Telepho	ne Number	21. Date	3	
Paula Grover Gray, Human Resources Director		410-535-16	00 ext. 2367	8/15/20	17 -	

each new or revised record series. Forward with Records Retention Schedule (DGS 550-1) RECORDS MAN 7275 Waterloo Jessup, M		OS MANAG /aterloo Ro essup, Mary	OF GENERAL SERVICES ANAGEMENT DIVISION oo Road, P.O. Box 275 o, Maryland 20794 410-799-1930		PAGE 3 OF 7	
Department/Agency	2. Division				3. Unit	
l '		-511	B			
Board of County Commissioners for Calvert	Department of	of Human	Resources		Benefits	
County, MD						
DEFINITION: RECORD SERIES: A group of related purposes.	mally filed a	ind used as a				
4. Record Series Title					st Year/Latest Year	
Pension Plan Records				199	0 to 2017	
6. Record Series Description (Briefly describe the tyseries.)  Documentation to include meeting minutes, plan documentation.					· ·	
trust.		•				
7. Record Series Formal(s) List all	8.1	Record Series	Sequence	9. Volume		
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☑ Letter Size ☐ Microfilm	∣⊠	Alphabetical		Number		
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Other (specify)		1		_Approx.1		
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11, File is Used	l	1	12. File Become	ae Inactiva Afl	ar .	
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☐ Daily 🔀 Weekly 🔲 Monthly 🔲 Ann	nually		Number		lonth(s) Year(s)	
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13. Current Localion(s) (Bldg., Floor, Room)			14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.)			
Department of Human Resources, County Services Plaza, Suita 16	01		Yes No			
45 have Darketter (IMea the Laute & Darketter)						
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)  ☐ Yes ☑ No			16. Audil Requ	irements		
			⊠ None [	State	Federal Independent	
					<del>-</del>	
17. Is an Index System used? If yes, explain briefly and describe t	requirements		18. Recomi	mended R	etention	
Yes 🛛 No			Retain 100	years, the	n destroy.	
	<u> </u>	ļ				
19. Name and Title of Preparer	20	0. Telepho	ne Number	21. Date	•	
Paula Grover Gray, Human Resources Director	41	10-535-160	00 ext. 2367	9/19/20 <sup>-</sup>	17	

Instructions –Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-%)  1. Department/Agency Board of County Commissioners for Calvert County, MD  DEFINITION: RECORD SERIES: A group of relate	Jessup, Maryland 2 410-799-1930  2. Division Department of Human Resour		GEMENT DIVIS pad, P.O. Box 2 yland 20794 9-1930 Resources	SION 275	AGENCY RECORDS INVENTORY  PAGE 4 of 7  3. Unit Benefits  erence as well as retention and disposition
purposes.  4. Record Series Title  Pension Investment Records			5. Earliest Year/Latest Year 2010 to 2017		
Record Series Description (Briefly describe the t series.)  Documentation of investments for pensions and Ot					e series. Include the purpose or function of the
7. Record Series Format(s) List all	ī	8. Record Series	s Sequence	9. Volume	
				3 Number	
☑ Legal Size ☐ Computer Tape		Numerical		⊠ File Dra	awer(s)
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☐ Bound Book ☐ Video Tape		☐ Geographic	al		
Other (specify)	Other (specify		ify)	10. Annual _Approx.1 Number	Accumulation
				<ul> <li>☑ File Drawer(s)</li> <li>☑ Microfilm Reel(s)</li> <li>☑ Computer Tape(s)</li> <li>☑ Other (specify)</li></ul>	
11. File is Used			12. File Become	es Inactive Af	ter
☐ Daily   ☑ Weekly   ☐ Monthly   ☐ Ann	nually		NA Number	<b>□</b> ^	Nonth(s) Year(s)
13. Current Location(s) (Bidg., Floor, Room)     Department of Human Resources, County Services Plaza, Suite 1	01 -		14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.)  ☐ Yes ☑ No		
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s) ☐ Yes ☑ No			16. Audit Requirements  ☑ None ☐ State ☐ Federal ☐ Independent		
17. Is an Index System used? If yes, explain briefly and describe requirements ☐ Yes ☑ No			18. Recommended Retention  Retain 5 years, then destroy paper records.		
19. Name and Title of Preparer		20. Telepho	ne Number	21. Date	3
· ·		00 ext. 2367 8/15/2017			

INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/RE√ISED ELECTRONIC RECORD SERIES, FORWARD	RECORDS M	OF GENERAL SERVICES ANAGEMENT DIVISION OO ROAD, P.O. BOX 275	ELECTRONIC RECORDS INVENTORY				
WITH		MARYLAND 20794	Page <u>5</u> of <u>7</u>				
RECORDS RETENTION SCHEDULE (DGS	(4	10) 799-1930	Page of/				
550-1)   COMAR   14.18.04							
1 DEPARTMENT/AGENCY	2 DIVISION		3 UNIT				
County Commissioners of Calvert County, MD	Department of	Human Resources	Benefits				
DEFINITION – Record Series - A group of rela and dispositio		d electronically and used as a	unit for reference as well as retention				
4 ELECTRONIO RECORD SERIES TITLE			E FARLIEGT VEARU ATECT VEAR				
4 ELECTRONIC RECORD SERIES TITLE Executive Correspondence			5 EARLIEST YEAR/LATEST YEAR 2015 TO Present				
C INDUT. Identify a super of information to be	h	7 OUTDUT Hands to					
6 INPUT - Identify source of information to be entered Email of employees 7 OUTPUT - Identify the use/s of information generated by system Electronic mail							
8 ELECTRONIC RECORD SERIES DESCR	IPTION - Brie	fly describe the information	/documents/forms				
	cont	ained in a series. Include	purpose and function of the system.				
Incoming and outgoing business-related corre	espondence that	provides unique information	on relating to the functions, policies				
procedures or programs of an agency. These							
executive decision maker is the agency director.							
9 POLICY ON ACCESS AND USE - Explain or attach copy if established in writing.							
Only the owner of the e-mail account has access to the account.							
10 UPDATING CYCLES OR CONDIT:ONS AND RULES FOR REVISING INFORMATION IN THE SYSTEM							
Permanent. Retain for 1 year, then transfer t							
11 SPECIFY THE LOCATION AND MEDIA			, , ,				
ensure the record's retention and usability Email account	y inroughout the	record's authorized life cyt	JIE.				
12 RECOMMENDED RETENTION							
Permanent. Retain for 1 year, then transfer t	o the State Arch	ives.					
13 TYPED OR PRINTED NAME OF	14 TELEPHO		15 DATE				
PREPARER	l 						
Paula Grover Gray	410-535-1600	ext. 2368	8/3/2017				
16 TITLE OF PREPARER	<u> </u>						
Human Resources Director							
DGS 550-6							

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INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/REVISED ELECTRONIC RECORD SERIES. FORWARD	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD, P.O. BOX 275 JESSUP, MARYLAND 20794 (410) 799-1930		ELECTRONIC RECORDS INVENTORY				
WITH RECORDS RETENTION SCHEDULE (DGS 550-1)			Page <u>(</u> of <u>7</u>				
COMAR 14.18.04		r .	<u>.</u>				
1 DEPARTMENT/AGENCY	2 DIVISION		3 UNIT				
County Commissioners of Calvert County, MD	Department of	Human Resources	Benefits				
DEFINITION - Record Series - A group of related records stored electronically and used as a unit for reference as well as retention and disposition purposes							
4 ELECTRONIC RECORD SERIES TITLE Administrative Correspondence		5 EARLIEST YEAR/LATEST YEAR 2015 TO Present					
6 INPUT - Identify source of information to Email of employees	7 OUTPUT - Identify the I Electronic mail	use/s of information generated by system					
8 ELECTRONIC RECORD SERIES DESCRIPTION - Briefly describe the information/documents/forms contained in a series. Include purpose and function of the system.							
Incoming and outgoing business-related correspondence created in the course of administering agency functions and programs.  Administrative correspondence documents work accomplished, transactions made, or actions taken. This correspondence documents the implementation of agency functions rather than the creation of functions or policies. Business-related correspondence that is related to a core function with an associated series should follow the associated retention period.							
POLICY ON ACCESS AND USE — Expla     Only the owner of the e-mail account has account his had account has account his had account has account his had account had account his had account had account his had account had							
10 UPDATING CYCLES OR CONDITIONS A Retain for 1 year then purge from email systems.	em.						
11 SPECIFY THE LOCATION AND MEDIA OF THE MAIN ELECTRONIC DATA FILE. Explain the progression established to ensure the record's retention and usability throughout the record's authorized life cycle.  Email account							
12 RECOMMENDED RETENTION  Retain for 1 year then destroy or purge from	email system.						
13 TYPED OR PRINTED NAME OF PREPARER	14 TELEPHO	NE NUMBER	15 DATE				
Paula Grover Gray	410-535-1600	ext. 2368	8/3/2017				
16 TITLE OF PREPARER Human Resources Director							
DGS 550-6							

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INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/REVISED ELECTRONIC RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1) COMAR 14.18.04	RECORDS M 7275 WATERL JESSUP,	OF GENERAL SERVICES ANAGEMENT DIVISION OO ROAD, P.O. BOX 275 MARYLAND 20794 10) 799-1930	Page of				
COMPTC 14.10.04							
1 DEPARTMENT/AGENCY	2 DIVISION		3 UNIT				
County Commissioners of Calvert County, MD	Department of	Human Resources	Benefits				
DEFINITION – Record Series - A group of related records stored electronically and used as a unit for reference as well as retention and disposition purposes							
4 ELECTRONIC RECORD SERIES TITLE Transitory Correspondence		5 EARLIEST YEAR/LATEST YEAR 2015 TO Present					
6 INPUT - Identify source of information to Email of employees	7 OUTPUT - Identify the u Electronic mail	use/s of information generated by system					
8 ELECTRONIC RECORD SERIES DESCRIPTION - Briefly describe the information/documents/forms contained in a series. Include purpose and function of the system.							
Incoming and outgoing correspondence related to matters of short term interest. Transmittal correspondence between individuals, departments or external parties containing no final contractual, financial or policy information. This correspondence does not impact agency functions. When resolved, there is no further use or purpose.							
9 POLICY ON ACCESS AND USE — Explain or attach copy if established in writing. Only the owner of the e-mail account has access to the account.							
10 UPDATING CYCLES OR CONDITIONS Retain until administrative need ends and the		R REVISING INFORMATION	ON IN THE SYSTEM				
SPECIFY THE LOCATION AND MEDIA OF THE MAIN ELECTRONIC DATA FILE. Explain the progression established to ensure the record's retention and usability throughout the record's authorized life cycle.  Email account							
12 RECOMMENDED RETENTION  Retain until administrative need ends and the	en destroy.						
13 TYPED OR PRINTED NAME OF PREPARER	14 TELEPHO	NE NUMBER	15 DATE				
Paula Grover Gray	410-535-1600	ext. 2368	8/3/2017				
16 TITLE OF PREPARER Human Resources Director							
DGS 550-6							